

**Bellanet Evaluation
Review of Activities
and Outcomes
1997 – 2002**

**Executive
Summary &
Bellanet's
Response**

PREPARED FOR:



PREPARED BY:



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EXECUTIVE SUMMARY OF EVALUATION FINDINGS AND RECOMMENDATIONS

The 2002/2003 Bellanet Evaluation of Activities and Outcomes provides an opportunity for Bellanet to reflect on its performance by assessing its overall effectiveness over the past five years. It also clearly demonstrates to Bellanet's donors the activities that it has been involved in and outcomes that it has influenced. In addition, it provides critical benchmark information and recommendations to guide Bellanet in improving the way it delivers services to better meet the needs of the development community in its next phase.

The evaluation found that Bellanet's partners were generally positive about its performance and agreed that Bellanet had influenced the development community through each of its service lines. It also identified a number of ways that Bellanet could improve its overall performance, such as by focusing its activities to have a significant impact on a few areas rather than less impact on many.

This section presents an overview of the observations and recommendations arising from the evaluation.

STRENGTHS TO BUILD ON

Bellanet is a dynamic organisation that has grown over the last eight years to meet the evolving demands and needs of the development community. The following strengths were identified as areas to be built upon as Bellanet moves into its next phase:

- ⇒ Bellanet is valued as a neutral party with the ability to bring together different players in development.
- ⇒ Bellanet possesses a solid combination of knowledge and expertise in applying information and communication technologies (ICTs) within the unique development context to enable and promote more effective collaboration.
- ⇒ Bellanet is viewed as being open, flexible, and innovative – a small organisation that is willing and able to experiment and accommodate partners' unanticipated needs.
- ⇒ Bellanet is networked with northern donors but is also tapped into the needs of southern organisations and has an ability to bridge the gap between the Non-governmental Organisation (NGO) and donor communities.

FINDING A NICHE

Bellanet's mandate is to assist development organisations in working together more effectively, especially using ICTs. This is a broad mandate and there are

many development players who have similar or complementary objectives. It is, therefore, critical for Bellanet to carve out a niche within this mandate.

Bellanet has successfully established a reputation as an expert in a number of areas, such as facilitating online dialogues and collaboration, nurturing communities of practice, and inspiring a culture of knowledge sharing. There was no consensus, among those consulted, on Bellanet's specific niche, but they did agree that all of its activities are important and that its service lines continue to be relevant.

Bellanet is a small and nimble organisation that seeks to meet the rapidly evolving needs of the development community, primarily through capacity building in key areas. In this regard, Bellanet should continually be "working itself out of a job".

Recommendation: Bellanet needs to continuously scan its environment to monitor and evaluate the evolving needs of the development community. Once capacity has been developed within its areas of work, Bellanet needs to find new activities or areas to move into. An example of this is Bellanet's effectiveness at developing international capacity in the area of knowledge management (KM). It is recommended that Bellanet continue to encourage the KM champions who emerge to look for opportunities to build this capacity in others. As well, Bellanet should leverage the successes it has experienced in KM capacity building in the North by focusing on the needs of southern organisations as it expands its regional presence in the South.

It is recommended that Bellanet take a proactive, strategic approach to the work that it pursues, rather than reacting to demands for contract services. This would require Bellanet to expand its funding base to invest in partnership activities and to obtain and seek out contracting opportunities that are consistent with its strategic directions.

REFOCUSING ACTIVITY AND RESOURCES ON THE SOUTH

Bellanet has been effective in delivering services in the North and has begun to look for ways of refocusing its activities in the South, where there continues to be considerable demand and opportunity to have a significant impact.

Recommendation: Bellanet should continue to expand its regional presence in the South. In order to facilitate this shift, Bellanet should develop a regional expansion strategy so that it can identify the specific regions that it wants to target over the next five years, the resources (financial and human) required to support a regional expansion and a staggered implementation to support the financial realities of the organisation.

The majority of Bellanet's partners supports its shift to the South. Bellanet has been increasing its network with organisations in the South and has the potential to significantly impact this community by assessing regional needs and applying its ICT expertise. The challenge will be focusing on the areas where Bellanet will be providing a unique service and in finding ways to support the increased demand on human and financial resources in the initial stages of this devolution.

LEVERAGING LIMITED RESOURCES

Bellanet has been effective in most areas of its operations, however, there are a number of areas where it could improve to better meet the needs of its partners and donors.

Bellanet has been operating as efficiently as possible within its current resources. However, it might have been over ambitious in its commitments given its financial and human resources capacity. While Bellanet was commended for attempting to respond to the ongoing demand and needs of the development community, it was viewed as falling just below client expectations in some areas of its operation.

Recommendation: Bellanet has three options to improve its effectiveness to better meet the needs and expectations of the development community:

1. Expand current funding base;
2. Narrow the focus of partners that Bellanet will work and collaborate with; and/or
3. Prioritise activities to leverage and direct all available funds to those key areas that will have the most impact in achieving Bellanet's mission and strategic directions.

While Bellanet should continue to look for opportunities to expand its funding base and leverage partnerships, it will also need to focus its activities. The following recommendations suggest areas for Bellanet to move away from versus those that it should pursue.

IMPLEMENTING SUPPORTING ACTIVITIES

GENDER

While gender has not been a formal initiative within Bellanet's programme lines and activities, the evaluation indicates that gender issues and considerations have been included in most, if not all, of Bellanet's initiatives and activities where appropriate.

A number of recommendations were provided for Bellanet to formalise a gender component in its activities, should it decide to move in this direction. Some suggestions for integrating gender into Bellanet's services and approach in the future included:

- ⇒ Engaging a gender expert;
- ⇒ Being more proactive in the assessment of gender perspectives/needs assessment at the early stages of project development/implementation;
- ⇒ Developing/adopting a Gender Equity policy;
- ⇒ Designing programmes for women development workers;
- ⇒ Providing opportunities for male/female job rotations;
- ⇒ Developing gender-focused distance training on IT use and applications;
- ⇒ Promoting more ICT for development activities specifically targeted at women and girls; and

- ⇒ Researching the gender bias/gender neutrality of communities of practice – in order to find ways to make them more open to marginalised stakeholders (including women, but also other groups).

Recommendation: Bellanet should engage a gender specialist to assist them to determine the most appropriate means for integrating a gender component in its services.

MONITORING AND EVALUATION

This evaluation identified a number of areas where Bellanet is currently excelling and other areas where it could improve. These findings will serve as a baseline for Bellanet's future evaluation activities. It is important that Bellanet continue to monitor and assess its activities and solicit feedback from partners on a continual basis in order to learn, improve, and expand its impact.

Recommendations:

1. Establish Client Service Standards

Bellanet would benefit from developing basic client service standards to help it better understand and manage client expectations. These service standards could include: response time to Internet inquiries, turnaround time in responding to technical problems associated with Bellanet services; professional standards for how partners and clients will be treated, etc.

2. Implement Client/Partner Feedback Mechanisms

Bellanet should find opportunities across each of its programme lines and activities to solicit feedback from clients regarding services and information that Bellanet is providing. These mechanisms could include: a web-based survey to collect feedback on the usefulness of Bellanet's website, soliciting feedback when new services or materials are developed to assess how practical and user friendly they are, ongoing feedback mechanisms within communities of practice to assess their direction and areas for improvement, etc.

3. Formalise Business Practices

Formalising Partnership Arrangements:

It is recommended that Bellanet implement a basic, but standardised, approach to engaging with partners on various initiatives. This might be accomplished by developing terms of reference, role agreements or memorandum of understanding among all partners in order to establish shared expectations and define individual roles and responsibilities. This would help to manage expectations of Bellanet's role within each initiative. In addition, establishing client or partner service standards would help to manage expectations and maintain performance in areas such as responsiveness and quality among all partners involved.

4. Introduce Improved Project and Financial Management Practices

Bellanet would benefit from developing new methods for effectively allocating funding/resources, overhead, and direct and indirect expenses to all of Bellanet's activities, including business development, professional development,

administration, travel, etc. This would help Bellanet develop indicators on the true cost of doing business and an accurate reflection of the costs associated with each of its activities. Bellanet may wish to investigate systems to better track time allocation and resource expenditures.

Gathering this information would allow Bellanet and its donors to evaluate where Bellanet is having the most impact based on the financial and human resources invested and where resources may be more effectively allocated to achieve Bellanet's mission.

POTENTIAL AREAS FOR BELLANET TO FOCUS ON IN THE FUTURE

SHARING LESSONS LEARNED AND BEST PRACTICES

Bellanet would have a greater impact on the development community if it focused on harvesting the information and experiences that emerge from its various activities and initiatives. In particular, knowledge is being created within a number of the communities of practice that Bellanet supports and there is widespread demand for this knowledge to be harnessed and disseminated. This could involve sharing highlights from mailing list discussions to developing best practices documents or training materials based on recent developments in its service lines.

The Knowledge Management for Development (KM4Dev) community of practice, for example, is very active and members are, at times, overwhelmed by the amount of information being shared – this represents an opportunity for Bellanet to capture this information and share it in a manageable way that summarises the discussions and highlights lessons learned and recent developments as the community evolves. This could also become an effective orientation tool for new members so that they could easily access, and be informed of, the outcomes of previous discussions and conclusions.

ACTIVE FACILITATION

Bellanet is viewed as an expert in facilitation and it could be better leveraging this expertise to more actively guide some of the key initiatives that are critical to supporting its strategic directions. Active facilitation requires a significant investment of time and energy and, therefore, Bellanet will need to be selective in deciding which areas it chooses to support in this way. However, there is widespread support among those consulted for this evaluation for Bellanet to take on a more active facilitation role. With this being said, it will be critical for Bellanet to maintain its neutral status. Therefore, Bellanet will need to consider each initiative to assess the role and needs of partners and participants to determine where it can provide the most value-added.

LEADERSHIP

Some of the initiatives that Bellanet has been involved with have lost their momentum and could benefit from an organisation taking the lead to ensure continued momentum. Bellanet will need to be strategic in determining which initiatives require it to assume a neutral role versus those that would benefit from Bellanet assuming a stronger leadership role.

Dgroups is an example where Bellanet's role could evolve from providing a significant amount of technical support to taking on more of a leadership role in the partnership and providing overall direction to the initiative. Bellanet could also shift its focus to more strategic advice and support to organisations who might apply Dgroups to meet their collaborative needs.

As well, if Bellanet re-establishes the IDML community of practice, it will require active leadership to regain the momentum it once had. Bellanet could either assume the leadership role or continue to promote open standards within the development community and engage another organisation who is willing and able to lead the IDML community.

The ItrainOnline initiative is another example where Bellanet's value-added was more so in the initial stages of the partnership and, therefore, Bellanet could scale back its involvement and allow another organisation to take the lead.

POTENTIAL AREAS TO MOVE AWAY FROM OR REFOCUS

This evaluation has identified a number of potential areas where Bellanet may want to consider reducing its involvement or scaling back its resource and partnership commitments. These areas are as follows:

SOFTWARE DEVELOPMENT AND ISP SERVICES

The evaluation highlights the perception that there are a number of private and not-for-profit organisations that could provide the strictly technical aspect of some of Bellanet's services, such as the Dgroups platform/interface development and maintenance, open source coding, hosting mailing lists, etc. It was also suggested that in a number of areas in the South, there is technical capacity that could be leveraged to provide these services. Bellanet will need to strike a balance between maintaining its technical expertise while being strategic in its involvement with technology development. As Bellanet develops and implements its regional expansion strategy, it will need to examine each region to assess the level of its ICT and technical capacity to deliver these services.

It is clear that one of Bellanet's key strengths is to approach the needs of the development community at a strategic level with a solid understanding of how ICTs can help improve development capacity.

ICT TRAINING

Throughout the evaluation it was suggested that there are many different players who deliver ICT training in development. While training should not be abandoned, it is recommended that Bellanet focus all future training and capacity building initiatives on its niche programming areas (e.g. open standards).

ITRAINONLINE

Bellanet's role was considered, by those consulted, to be more critical at the outset of this initiative in bringing partners together and contributing its experience with Itrain. Bellanet would benefit from reassessing its role in this initiative to determine whether it should reduce its role as a partner but continue to be involved or completely eliminate its activities within this initiative and invest its time and resources in more strategic areas.

KM4Dev

Bellanet has made considerable progress in building capacity in the North and it is recommended that it focus its time, energy and resources on building similar capacities in the South. This recommendation is supported by the findings of this evaluation.

Please find below Bellanet's response to the evaluation findings.

BELLANET'S RESPONSE TO THE EVALUATION FINDINGS

In January 2003, Bellanet undertook a preliminary strategic planning session to begin to map out its future directions, with the intent of using the evaluation findings to update and revise this draft strategic plan. TGN presented the evaluation findings and related recommendations to Bellanet staff at the Evaluation Review and Planning Session in April 2003. During this session, Bellanet staff discussed the findings and their implications on how it could continue to meet the needs of its partners and the larger development community.

This section highlights Bellanet's proposed strategic direction for April 2004-2009, as discussed in the session, along with the actions it plans to take to incorporate the findings of this evaluation to improve its effectiveness as it moves into its third phase of operation. These priorities and directions have been further refined by Bellanet in its Final Phase 3 proposal.

BELLANET'S PROPOSED STRATEGIC DIRECTION APRIL 2004 – 2009

1. Shift to the South – strengthen south-south collaboration, tools and presence;
2. Special focus on exploring open development – as part of an integrated set of program lines; and
3. Options for Devolution – Manage and coordinate the shift to a networked, decentralised organisation with regional presences in the South.

POTENTIAL MILESTONES

- ⇒ Year 1: Consolidate 3 regional offices;
- ⇒ Year 2: Strengthen capacity in the regions;
- ⇒ Year 3: Transfer capacity from Ottawa;
- ⇒ Year 4: Consolidate networked organisation; and
- ⇒ Year 5: Conclude devolution and launch Phase 4.

LESSONS FROM EVALUATION FINDINGS

Bellanet views itself as having accomplished a great deal over the last eight years with limited resources and a small, but dedicated, team. Bellanet feels, and the evaluation confirms, that it has been effective in most areas of its operations; however, it also recognises that it could improve by expanding its resource base and prioritising its activities to best support its strategic directions.

CHALLENGES IDENTIFIED BY BELLANET

Being more selective and proactive in setting priorities:

- ⇒ While Bellanet will continue to try to do more with less, it recognises the need to leverage funding and partnerships and/or focus its energies and resources on the areas and activities that will have the greatest impact

- ⇒ Bellanet is aware of the need to more actively facilitate dialogues and share knowledge, which requires significant time and energy.
- ⇒ Bellanet will continue to balance the use of ICTs with the human component.

Shifting focus to South:

- ⇒ Bellanet's devolution to the South will require increased resources in the initial stages with the long-term vision of reducing Bellanet's workload.
- ⇒ Bellanet will need to build and support the technical capacity of organisations in the South.

ACTIONS FOR INTEGRATING FINDINGS

INTRODUCTION

As Bellanet moves forward, it will consider the impact of narrowing its target population and reducing the number of activities it undertakes in order to leverage funding and more effectively deliver services.

In light of the evaluation findings and recommendations, Bellanet has decided to make several changes to its strategic direction. These changes were decided upon in order to respond to evaluation feedback and recommendations and to improve Bellanet's ability to deliver services more effectively to its partners as well as the larger development community.

CULTIVATE STRENGTHS

The evaluation identified Bellanet's key strengths as its:

- ⇒ Neutral reputation;
- ⇒ Focus on collaboration;
- ⇒ Ability to build and facilitate partnerships;
- ⇒ Ability to work at a strategic level while building on its ICT expertise; and
- ⇒ Flexibility and willingness to adapt to the evolving needs of the development community.

Bellanet will, therefore, continue to promote and build upon these strengths as it moves forward.

FOCUS ACTIVITIES

As Bellanet shifts its focus to the South, it will focus its programming on:

- ⇒ Strengthening its Open Development (OpenDev) service line as an exploration of the impact that it can have on the development community; and
- ⇒ Making Online Communities and Knowledge Sharing its core programming areas.

Bellanet feels it can incorporate the findings of this evaluation to improve its activities in these areas to have a greater impact.

Bellanet recognises that the initial stages of establishing a regional presence in the South will require considerable effort and resources. It is, therefore, receiving advice and support from its donors and will consider engaging other partners to help ease this transition. It will also look at the need to stagger its regional presence expansion to avoid unnecessary financial and workload strains.

In order to successfully implement this devolution to the South and play a more active role in its core programming areas, Bellanet will need to scale back on some of its activities. The following is a preliminary list of the potential areas where Bellanet can reduce its commitments and activities:

- 1) **Small Contracts**
Due to the administrative costs associated with small contracts, Bellanet will not pursue contract engagements that are under \$25,000 unless they have strategic value or are in-line with Bellanet's work in the South. This will allow Bellanet to be more strategic in the work that it pursues and to have a greater impact through its larger-scale contract engagements.
- 2) **Software and ISP-related Contracts**
Bellanet will not pursue projects where its only value-added is in the technical work, such as building websites that might be outside of its core programming areas. Bellanet will no longer provide coding or system development services, but will look for partners with the capacity to deliver services in these areas. Bellanet will continue to focus on ensuring proper system and user specifications are identified and oversee the management side of software development to ensure that it maintains its technical expertise.
- 3) **Training as a Service Line**
After much discussion of the evaluation findings and perceptions of Bellanet staff, Bellanet recognised that its approach to training is more of a cross-cutting activity or service that supports and enables its other programming areas. If Bellanet is to eliminate its training programme line, it will need to assess how training-related activities will be refocused. Bellanet plans to take a targeted, strategic approach that involves focusing the development of its training materials and delivery of train-the-trainer activities on its core programming areas.

Bellanet will re-examine its involvement with ItrainOnline to determine where its value-added exists and to consider whether it should refocus its training activity on developing Itrain materials related to its core programming areas, which would be shared with ItrainOnline.

- 4) **Disjointed Initiatives**
Bellanet recognises that it has a number of initiatives that it has been involved with which may no longer be aligned with its current strategic direction. While these initiatives are generally very small, when added together, they take up time that could be better distributed elsewhere. Bellanet will, therefore, assess these initiatives to determine whether or not they are in line with its strategic direction. If they are not, Bellanet will actively disengage with appropriate communications explaining its rationale and, where appropriate, look for other partners who will continue to move

forward with the initiative or activity, with Bellanet providing transition-related guidance and advice.

STRENGTHEN APPROACH

The evaluation findings identified a number of areas that could help Bellanet to improve its effectiveness in its next phase of operation. Bellanet has decided to implement the following changes to its approach to service delivery and working with partners to better meet their needs.

1. Proactive Facilitation and Knowledge Harvesting and Dissemination

By scaling back on some of its activities, Bellanet will have more time to harvest and share the experiences and lessons learned that emerge from its core programming activities. It will also determine whether it should play a more active role in facilitating the partnerships or initiatives in its core programming areas, such as Dgroups or IDML.

2. Partner Service Standards and Feedback Mechanisms

This evaluation provided an opportunity to solicit feedback from Bellanet's partners; however, Bellanet recognises the value of gathering feedback on an ongoing basis and the need to build feedback mechanisms into its ongoing business practices.

In order to set service standards at the outset, Bellanet will implement a standard role agreement in its partnerships in order to clarify the roles of each partner and what is expected in terms of responsibilities and the estimated timelines for milestones. This will allow Bellanet to better manage its partners' expectations and set service standards.

Bellanet will also integrate ongoing client/partner feedback mechanisms to ensure that it is meeting partners' expectations and to learn and improve throughout the life of the partnership or initiative. Bellanet will need to assess its key programme areas and activities to identify where it can begin to introduce paper-based or electronic forms of feedback mechanisms.

3. Resource Allocation

In attempting to determine where to focus its activities, Bellanet has learned that it would benefit from better tracking of its resource and time allocation to its activities and programming areas. While many of Bellanet's activities overlap, (making strict time tracking a challenging task) Bellanet will define a list of core activities that cuts across its programming areas to track for a pre-set period of time to explore where time is being spent and whether or not it should be reallocated to different activities.

4. Monitoring and Evaluation

Bellanet has taken away considerable lessons from this evaluation and plans to implement ongoing monitoring and assessment mechanisms, as well as periodic external evaluations in the future. As a starting point, Bellanet has a meeting scheduled for early June 2003 to establish performance measurements and indicators for the LAC Regional Presence. A 'Monitoring and Assessment Strategy'

will also be developed during the Annual Bellanet Retreat scheduled for early September 2003. One mechanism that Bellanet will pursue on a quarterly basis is the "stop, start, continue" exercise which was initiated in the April 2003 Evaluation Review and Planning Session. This exercise will enable Bellanet to:

- ⇒ Actively assess where it is allocating its time and resources;
- ⇒ Determine whether it should be stopping initiatives that are no longer supporting its strategic direction or are taking up too much time;
- ⇒ Identify activities that Bellanet should be starting in order to improve its effectiveness or better meet its partners' needs; and
- ⇒ Pinpoint areas that are working well and should be continued into the next quarter.

5. Gender

Bellanet will engage a gender expert to guide it through a session focused on integrating gender in its core programming areas.

6. Effective Communication

Bellanet recognises that effective communication is critical to:

- ⇒ Managing partner expectations;
- ⇒ The success of partnerships and initiatives;
- ⇒ Ensuring shared understanding of Bellanet's role in its initiatives;
- ⇒ Establishing new partnerships;
- ⇒ Expanding its network and funding base; and
- ⇒ Promoting its services and having the greatest impact within the development community.

Bellanet will develop a strategic communications plan to enable it to communicate its new strategic direction, the rationale for changes from its former service lines and direction, and to clarify its role in its initiatives.

The evaluation findings that informed Bellanet's revised strategic direction are presented in the Final Report.